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FOREIGN FOOD PRODUCTION, CURRENT PROSPECTS FOR 1946-47

The following is a summary of a report on the world's food-production prospects released May 26, 1946 by the Office of Foreign Agricultural Relations. Only a limited number of copies of the full report are available.

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World food production in 1946-47 will be somewhat larger than in 1945-46, according to crop prospects in early May. Low carry-over of reserves into the 1946-47 season, however, puts total food supplies below pre-war levels and short of world requirements. Hence, effective conservation and distribution of supplies, internationally and within deficit producing countries, will be necessary throughout 1946-47, if another critical food shortage is to be avoided next spring.

These are conclusions of a spring (May 15) review of the world food situation, with particular reference to production factors in the 1946 season, such as weather, prospective acreage and facilities. The current review brings forward by three months the information on the world food situation in the last previous reports by the Office of Foreign Agricultural Relations. The review is based upon regular and special reports by agricultural attaches of the Foreign Service, and upon information from other sources.

The food situation has become more critical in the last three months, as forecast in previous reports, in October, 1945 and February, 1946. Official rations have been reduced in most food-deficit areas and it appears doubtful that even if the increased efforts of surplus producing areas to supply food are carried out, the present low rations can be maintained in the deficit areas.

Crop conditions in nearly all parts of the Northern Hemisphere thus far have been more favorable than a year earlier. A significant increase in acreage is expected and yields should be better than in 1945. However, acreages in many of the war-torn areas are considerably below normal and improvement in yields is limited by shortage of fertilizers and the shortage and poor quality of seed, work stock, and equipment. Thus handicapped, food production is expected to be considerably below prewar levels, though substantially larger than in 1945.

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In Europe, a considerable increase in grain and sugar production in 1946-47 over the preceding year is in prospect, perhaps a slight increase in the production of fats, but little change in most other foodstuffs. Crop conditions in Western Europe, most of Southeastern Europe, and the Mediterranean region were reported to be good up to the end of April.

In many parts of Central and Eastern Europe, however, moisture deficiency has been reported, and extraordinary social changes, shifts in population and shortage of draft power continue to restrict production in this area.

Early spring favored plantings in the major portions of the Soviet Union. The total crop area seeded in the present territory is planned to be about 20 million acres larger than the area seeded last year. Should this increase be realized, acreage in the prewar territory would be about 90 percent of 1941. In early May some crop deterioration was reported in the Ukraine because of sub-normal rainfall and a late spring was causing some lag in sowing in eastern regions.

Over-all prospects in the Far East also favor some expansion in acreage but production of food crops will be considerably below prewar, especially if increases in the population are taken into account. Early spring rains in eastern India are enabling the farmers to get their crops in early and under favorable conditions. Conditions for the spring wheat crop of China also are favorable but prospects for the early rice crop in southern China have deteriorated due to drought.

Some expansion in food production is also likely in the surplus producing areas. In Brazil a record crop of rice is being harvested and somewhat larger supplies of corn will be available for export. Exports will be limited, however, because of the necessity of extensive substitution of these products for wheat, for domestic consumption. A larger crop of sugar for harvest in 1947 is expected in Cuba and an increased acreage of wheat has been sown in Canada with plantings completed unusually early.

In the Southern Hemisphere, where winter wheat crops are now being planted, conditions also favor some expansion in acreage. Weather conditions in Australia are favorable for an expansion in wheat acreage and the recent advance of wheat prices in Argentina is expected to stimulate additional plantings in that country.

The drought in South Africa has broken and conditions have improved for the current corn crop. New Zealand, however, has experienced an extensive drought. Dairy production has been sharply reduced and it has been necessary to market some livestock early because of the pasture shortage.

Current Situation Critical in Europe and the Far East

During the past three months and particularly since April 1, the majority of countries have had to reduce their official rations and in a few countries the per capita food supply has been reduced to dangerously low levels. While reductions in rations have been general in Europe the cut in Germany and Austria has been particularly drastic and it is in these countries and in Italy where the most serious situation has arisen.

In China serious famine conditions are being experienced in many of the interior Provinces and in Kwangtung.

The volume of exports of food moving from surplus areas has been at unusually high levels of recent months but in most countries has not been up to expectations.

From both the United States and Canada exports thus far in 1946 are behind schedule and while efforts are being made to increase exports, available supplies are limited and renewed efforts to increase the exportable supplies are still falling short of meeting the essential requirements of the deficit countries.

In Argentina, wheat prices have been low relative to the prices of other products and marketings have been very disappointing. It is hoped, however, that a recent advance of 46 cents per bushel will stimulate marketings and provide larger quantities of wheat for export.

Revised estimates of the wheat crop in Australia have revealed the crop to be larger than was anticipated earlier so that larger quantities are available for export and supplies are moving out rapidly, mostly to the Far East.

Exports of rice from Siam were held up awaiting satisfactory agreement on prices and exchange rates. But an agreement has been reached now and preiums are being offered for early delivery so that a prompt increase in exports is expected.

Estimated average consumption of food by the nonfarm population in selected European countries, autumn 1945 and spring 1946

Country	Autumn 1945*		Spring 1946	
	Period	Calories per person per day**	Period	Calories per person per day**
Austria (Vienna)	December	1,800	April	1,550
Belgium	October	2,550	April	2,300
Czechoslovakia	October	2,150	April	2,225
Denmark	December	2,900	March	2,900
Finland	November	1,825	February	1,950
France	October	2,250	April	2,150
Germany, U.S., U.K., French Zones	December	1,750	May	1,450
Greece	September	2,200	April	1,900
Italy	October	1,650	March	1,475
Netherlands	November	2,525	April	2,350
Norway	November	2,400	March	2,375
Portugal (Lisbon)	October	1,900	March	1,775
Spain	October	1,625	February	1,600
Sweden	September	2,800	March	2,650
Switzerland	October	2,525	March	2,600

Office of Foreign Agricultural Relations, May 15, 1946.

* Partly Revised

** Retail level